

Position: SALESFORCE MANAGER
Department: STRATEGY & LEARNING
Reports to: SENIOR DIRECTOR OF DATA OPERATIONS
Date Prepared: JUNE 2018

ORGANIZATION SUMMARY

United Way of Salt Lake's (UWSL) mission is to build powerful partnerships that achieve lasting social change. We implement data-driven, equitable practices to eliminate barriers to success, and create opportunities and solutions that assist people to achieve their goals, dreams, and human potential. Our workplace is fast-paced, progressive, innovative, friendly, and adaptive; our core values are: Relationships, Results, Innovation, and Continuous Improvement. At UWSL we believe in celebrating success, learning from failure, and setting ambitious goals. We offer competitive compensation including a comprehensive benefit package, generous paid time off, and flexible schedules - all contributing to our unique company culture.

POSITION SUMMARY

The Salesforce Manager is responsible for overseeing and further developing UWSL's CRM tool, Salesforce, to ensure best practices of constituent engagement; to extract data that drives decisions, and to streamline internal processes. The Salesforce Manager works with every department in the organization to develop and write reports and organize dashboards; manage data integrations between Salesforce and its associated applications; extract, transform and load data into data warehouse; and support the organization in using data to drive organizational goals.

ESSENTIAL FUNCTIONS

SALESFORCE MANAGEMENT

1. Maintain deep understanding of organizational priorities, key performance measures, and strategies driving all departments and ensure the data Salesforce contains is accessible and operational to end-users
2. Serve as technical lead, working with CRM users and management to determine requirements/design
3. Build reporting and other capacity among others to extract, understand, and use data from Salesforce
4. Train Salesforce Process owners and other CRM users on new and existing features in Salesforce, so they are able manage features and populate data fields necessary to maximise use and functionality ongoing

DATA INTEGRATIONS

1. Support the integration between UWSL's local instance of Salesforce and Salesforce Philanthropy Cloud, including the extract, transform, and loading of shared donor records with United Way Worldwide
2. Work with departments to analyze and document business requirements, outline and execute on development tasks, and complete beta testing and rollout
3. Coordinate with end-users throughout all phases of development, testing and deployment.
4. Manage donor engagement platforms that sync to Salesforce. Maintain accurate API's.
5. Research and maintain knowledge of relevant third-party tools to be used in conjunction with Salesforce

INTERNAL REPORTING AND DATA ACCESS

1. Query data from both SQL server and Salesforce. Document required use by position, including purpose and frequency.
2. Build reports and organize dashboards in Salesforce that support organizational priorities.
3. Build custom objects and fields, customize layouts, and automate process.
4. Confirm data feeds are accurate into Salesforce and SQL server
5. Work collaboratively with analysts to facilitate quick and accurate responses to end user needs.
6. Be a go-to to to extract timely, accurate data that helps us tell our story and engage people in our work.
7. Other duties as assigned.

REQUIRED COMPETENCIES

- **Project Management.** Ability to manage a project's scope, resource requirements, dependencies, steps and timelines.
- **Problem-solver.** Execute on established solutions, ask questions, and observe situations and come up with solutions. Troubleshoot end-user problems.
- **End-user focus.** Ability to design and test solutions that meet user needs in long-term and consistent ways.
- **Continuous Improvement.** Confidence and humility to ask questions, admit and address challenges, "fail forward," and learn and test continuous improvement tools and techniques
- **Integrity.** Stays current on the rules and regulations that govern their area of responsibility; maintains and respects confidentiality of sensitive information
- **Communication.** Ability to write and speak with diverse stakeholders; to discuss complex data topics in ways that are appropriate to the audience
- **Manage Self.** Ability to operate effectively, even when things are not certain, when conditions are shifting, or the way forward is not clear

QUALIFICATIONS

- Bachelor's Degree in IS, CIT or equivalent experience in a relevant field
- 2 years of experience with Salesforce or other CRM solutions
- Proven experience ETL processes and developing CRM platforms
- Ability to organize and query data in SQL databases

PHYSICAL REQUIREMENTS

The employee regularly communicates with internal and external stakeholders and is required to communicate clearly, in oral and written formats and must be able to exchange accurate information. The employee must be able to transcribe, read extensively, prepare and analyze data and figures, operate a computer and other standard office machinery. The employee is required to work primarily from UWSL during core business hours.

BENEFITS

This is an exempt position, salary to commensurate with experience.

APPLY

Please visit UWSL's [Employment Opportunities](#). A complete application will include a resume and cover letter. You may contact jobs@uw.org if you have any questions regarding employment opportunities.

NOTE: The statements in this position description are intended to describe the general nature and level of work being performed but are not to be seen as a complete list of responsibilities, duties, and skills required of the person employed. Also, the statements do not establish a contract for employment and are subject to change at the discretion of the employer.